



Arizona CHOICES Access to Recovery

Voucher Management System (VMS)

**Training Manual
For Service Providers**



The Voucher Management System

Introduction

Welcome to the Voucher Management System (VMS)!

This web-based tool is used to manage Access to Recovery Drug Court Client treatment and recovery support services vouchers.

The Manual is divided into five sections that will go over the steps you need to know to successfully view the client referrals that have been assigned to you, how to accept the clients and vouchers, and how to send the information necessary to complete the billing process.

If you ever have questions on how to maneuver through the VMS system, please feel free to contact Pima Prevention Partnership at:

azatrhelp@thepartnership.us

1-866-476-5777

Help is available Monday through Friday, 8:00 am to 5:00 pm. We will make every attempt to respond within one business day.

Section One: Getting Started

In this section you will:

- Find out where to go on the internet to access the VMS system and learn about your password.
- Become familiar with the components on the VMS home page

Section Two: Client Services

In this section you will learn how to: search for, and review:

- Search for, and review, client referrals to your agency.
- Search for, and review, vouchers sent to your agency by the Drug Courts Case Managers
- Accept the client referral.
- Accept vouchers so services can be provided to the client.
- Create Encounters to record the services rendered.
- Release the Encounters to billing.

Section Three: Billing and Payment

In this section you will learn how to:

- View billing claims and provider payments

Section Four: End of Services

In this section you will learn how to:

- Close a client record



Section One:

Getting Started in VMS

✓ Before You Start

Before You Start...

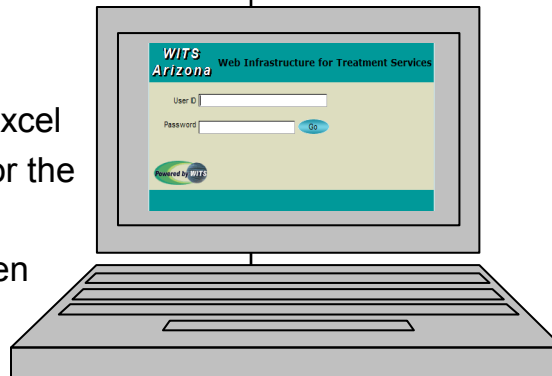
- ✓ Use Internet Explorer as your web browser. The VMS does not work well with other web browsers such as Mozilla Firefox.
- ✓ Please note that the website address does not include “www” at the beginning.
- ✓ “Maximize” your screen by clicking on the icon in the top right corner.
- ✓ Always remember to log out of the VMS system. For security reasons, the system is designed to lock out users with open, inactive connections.
- ✓ Many of the screens allow you to download the information into an Excel spreadsheet. To download, look for the **(Export)** link and hold the **CTRL** button down until the prompt to open the file appears.

The VMS website address is:

<https://az.witsweb.org>

Each time you log into the VMS, you will enter a User ID, Password, and PIN.

- You will receive an email with your User ID, Password, and PIN number to use the first time you log into the system.
- Once you log in, you can choose your own Password and PIN. These must be at least six (6) characters long and contain at least one number and one letter.



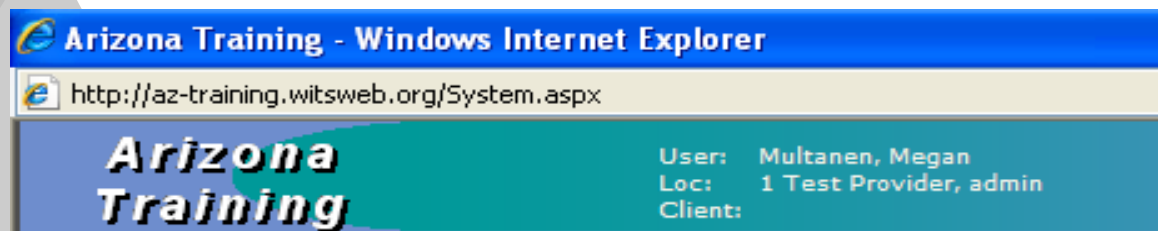
For help with the VMS system, email azatrhelp@thepartnership.us

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version 1.3

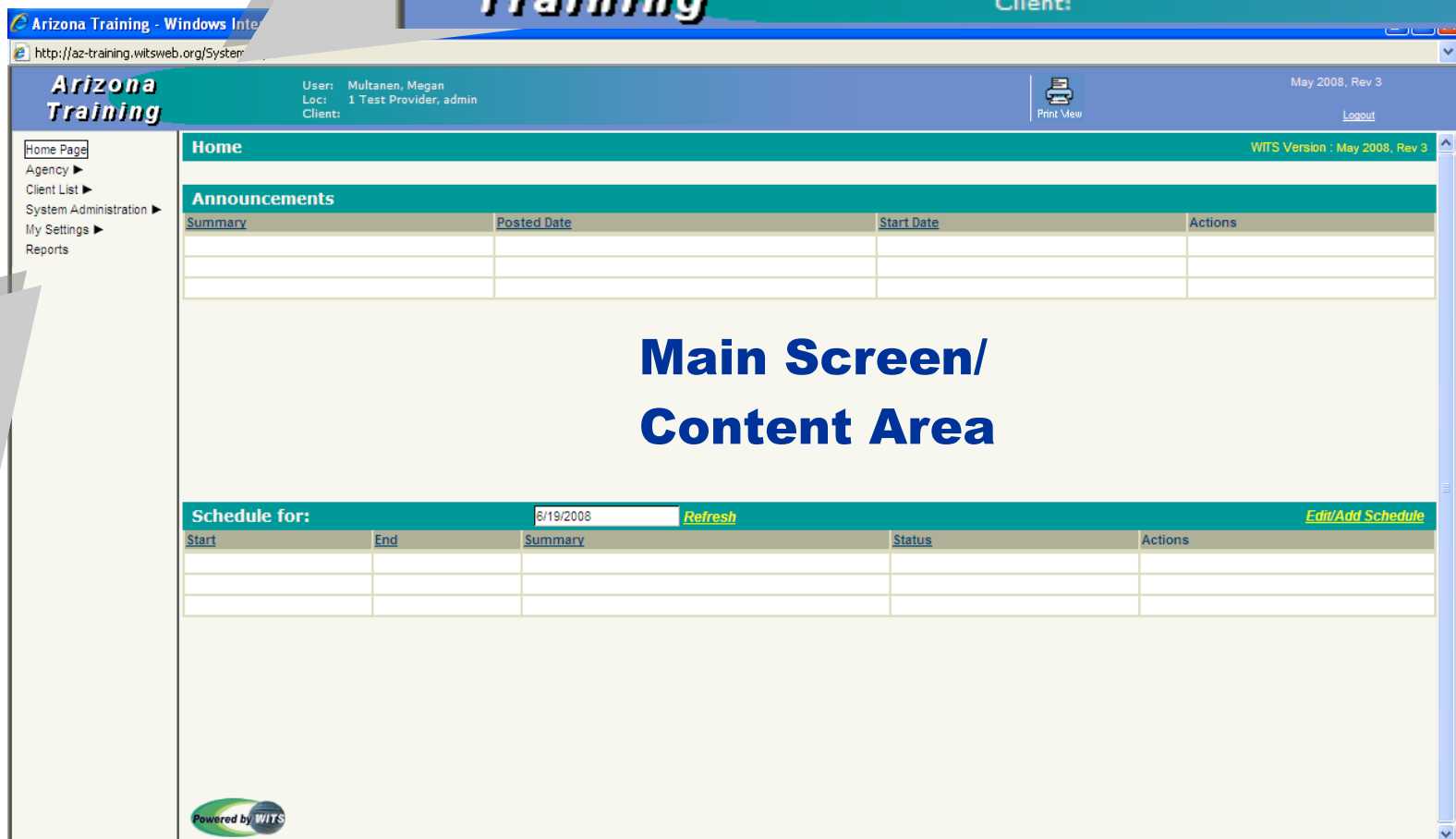
Section One:

Getting

**Top
Navigation
Bar**



**Left Side
Navigation
Pane**



For help with the VMS system, email azatrhelp@thepartnership.us

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version 1.3

Section One:

Getting Started in VMS

✓ The Home Page

The first screen that opens in the VMS system is the *Home Page*. This is where you'll be able to see any referrals and announcements for your facility.

If there are any announcements for your agency, you will see them in the "Announcement" section of the *Home Page*.

- ✓ Any announcements that have been posted for your agency will appear in the "Announcement" section of the *Home Page*.

To view the details on an announcement click on **Review** active link in the "Actions" column.

- ✓ Referrals will appear at the top of the screen directly below the Top Navigation Bar.

To review the client referrals for your agency:

1. Move your mouse to the *Left Side Navigation Pane*
2. Click on the **Agency** link
3. Click on the **Referrals** link
4. Click on the **Referrals In** link

This opens the *Referrals Search* screen.

Arizona Training

User: Calendina, Kay
Loc: 10 Test Provider, 10 TP Facility
Client: August 2008

Logout

WITS Version : August 2008

Home Page

Agency

Agency List

Agency Profile

Contacts

Relationships

Announcements

Referrals

Referrals In

Vouchers

There are currently 2 people that have been referred in.

Home

Announcements

Summary

Announcements will appear in this section

Actions

Review

Arizona Training

User: Multanen, Megan
Loc: ABC Treatment Program, ABC Treatment Program
Client: August 2008

Referrals for ABC Treatment Program (Export)

Referral Status Codes

Search Criteria

Placed/Accepted

Referral Created/Pending

Referred Terminated

Refused Treatment

Go

Actions	Name	Created Date	Referred To Modality	Referral Status




Section Two:

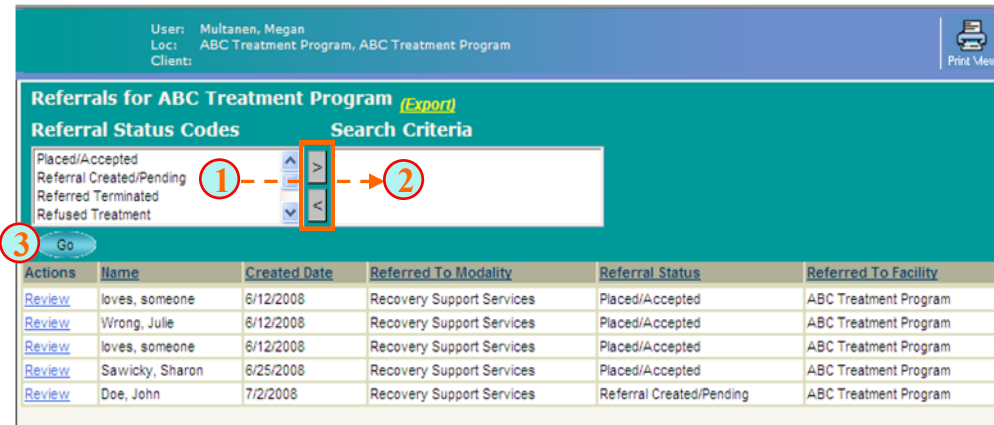
Client Services

✓ Viewing Client Referrals

From the *Referrals Search* screen, you are able to search for the clients who have been referred to your agency. begin

To search for client referrals:

1. Select your search criteria from the “Referral Status Codes” box by clicking on the code so it is highlighted.
 - ✓ New referrals will be categorized under “Referral Created/Pending.”
 - ✓ You may select more than one status code by holding the Shift key while clicking on the code.
 - ✓ If the Search Criteria box is left blank, the system will list all of the clients referred to your agency, regardless of their status.
2. Move the status code to the “Search Criteria” box by clicking the  button.
3. When you have selected all of your search criteria, click on the Go button This will bring up a list of client referrals for your agency that match the search criteria.



Actions	Name	Created Date	Referred To Modality	Referral Status	Referred To Facility
Review	loves, someone	6/12/2008	Recovery Support Services	Placed/Accepted	ABC Treatment Program
Review	Wrong, Julie	6/12/2008	Recovery Support Services	Placed/Accepted	ABC Treatment Program
Review	loves, someone	6/12/2008	Recovery Support Services	Placed/Accepted	ABC Treatment Program
Review	Sawicky, Sharon	6/25/2008	Recovery Support Services	Placed/Accepted	ABC Treatment Program
Review	Doe, John	7/2/2008	Recovery Support Services	Referral Created/Pending	ABC Treatment Program

Referral Status Codes Definitions

- Placed/Accepted: The provider has accepted the referral and agrees to provide the services.
- Referral Created/Pending: The provider has not yet accepted the referral. These are new referrals for the provider to review and accept or decline.
- Referred Terminated: The provider has terminated the referral.
- Refused Treatment: The services were refused by either the client or the provider.
- Waitlisted: The provider plans to accept the client; however, the client must be put on a waitlist to receive services.



Section Two:

Client Services

✓ Referral Status Definitions

When the client list is generated, any referred clients for your agency appear at the bottom of the *Referrals Search* screen. This screen contains several categories:

Actions: What options you have, (i.e. review client referral information). This box will contain an active link.

Name: The name of the client as entered by the referring party (i.e. the Drug Court).

Referral Date: Date Drug Court Case Manager referred client to services.

Referred to Modality: The service category to which the Drug Court Coordinator is referring the client. This will be either Recovery Support Services or Treatment Services.

Referral Status: Automatically displays the appropriate referral status code.

Referred to Facility: The facility to which client is referred for services.

Non-System Agency: Indicates whether the partner is part of the ATR system.

Referral Comments: Contains any comments the Drug Court Coordinator has made in the referral process.

Referrals for 2 TP Facility (Export)									
Referral Status Codes		Search Criteria							
<input type="text" value="Placed/Accepted"/> <input type="text" value="Referral Created/Pending"/> <input type="text" value="Referred Terminated"/> <input type="text" value="Refused Treatment"/>									
Go									
Actions	Client ID	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
Review	M439352MS468100	Smith, David	4/3/1983	7/10/2008	Maricopa County Drug Court/Maricopa County DC	Recovery Support Services	Placed/Accepted	2 TP Facility	
Review	M669835OG037100	Gonzalez, Reggie	6/6/1978	7/10/2008	Maricopa County Drug Court/Maricopa County DC	Recovery Support Services	Placed/Accepted	2 TP Facility	
Review	F249695FA807121	Afton, Amy	12/24/1976	7/10/2008	Maricopa County Drug Court/Maricopa County DC	Recovery Support Services	Placed/Accepted	2 TP Facility	
Review	F249695FA807121	Afton, Amy	12/24/1976	7/24/2008	2 Test Provider/2 TP Facility	Recovery Support Services	Placed/Accepted	2 TP Facility	
Review	M219859EP946101	Peters, Paul	12/1/1968	7/24/2008	Maricopa County Drug Court/Maricopa County DC	Recovery Support Services	Placed/Accepted	2 TP Facility	
Review	M129550AH066110	Harding, Fred	1/12/1965	9/3/2008	Maricopa County Drug Court/Maricopa County DC	Recovery Support Services	Referred Terminated	2 TP Facility	
Review	F229202AV026100	Vargas, Dora	2/2/1962	9/3/2008	Maricopa County Drug Court/Maricopa County DC	Recovery Support Services	Placed/Accepted	2 TP Facility	
Review	F509280EP298120	Penman, Amy	5/20/1982	9/3/2008	Maricopa County Drug Court/Maricopa County DC	Recovery Support Services	Placed/Accepted	2 TP Facility	



Section Two:

Client Services

✓ Accepting Client Referrals

Detailed client referral information can be seen for each of the clients listed by reviewing the client referral.

To review the client referral:

1. Click on the Review active link in the “Actions” box. The *Client Referral* screen will appear.

To see voucher information and details regarding the client’s service needs, the referral will need to be **Accepted**.

To **Accept** the client referral:

2. Select Placed/Accepted from the drop down list in the “Referral Status” box.
3. Click Finish to complete this step.

Please Note: In this step you are accepting the clients’ records so that you can see detailed client information and any comments entered by the Drug Court Case Manager. This is not a consent to provide services.

Referrals for Facility 1 [Export](#)

Referral Status Codes: Placed/Accepted, Referral Created/Pending, Referred Terminated, Refused Treatment

Search Criteria:

Go

Actions	Name	Referral Created Date	Referred To Modality	Referral Status	Referred To Agency	Referred To Facility	Non System Agency	Referr
Review	Smith, Debbie	2/19/2008	Recovery Support Services	Placed/Accepted	Provider	Facility 1		
Review	Smith, Debbie	2/26/2008	Recovery Support Services	Placed/Accepted	Provider	Facility 1		
Review	Ray, Rachel	3/2/2008	Recovery Support Services	Placed/Accepted	Provider	Facility 1		
Review	02, Client	3/7/2008	Recovery Support Services	Placed/Accepted	Provider	Facility 1		
Review	gupta, swati	3/10/2008	Recovery Support Services	Placed/Accepted	Provider	Facility 1		

Client Referral for 04, Client

Referred By

Agency: Case Management
Facility: CM
Staff Member: Najera, Ludwig
Program: ATR : 1/1/2008 -
State Reporting Category:
Reason: No capacity
If Other:
Is Consent Verification Required? Yes
Is Consent Verified? Yes
Continue This Episode of Care? Yes

Referred To

Signed Consents: Provider
Agency: Provider
Facility: Facility 1
Staff Member:
Program: ATR
State Reporting Category:
Non-System Agency:
Non-System Modality:
Non-System Specifier:
Appt Date: Undetermined
Consents Granted:

Comments:

Referral Status: **Placed/Accepted**
Referral Date: 3/17/2008
Projected End Date:
Created Date: 3/17/2008 2:07 PM

[Cancel](#) [Finish](#)



Section Two:

Client Services

✓ Accepting a Client Voucher

You can view client vouchers through the **Agency** link on the *Left Side Navigation Pane*. However, to accept the voucher, you will need to go through the Client link.

When you accept a referral, the VMS will automatically open the **Client** link, bypassing the need to perform a client search.

To Accept or Decline a client voucher:

1. From the *Left Side Navigation Pane*, click on the **Client List**, **Client Profile**, and **Voucher** links.

The *Voucher List* screen displays a list of the client's available vouchers.

- ✓ You must first accept the voucher before you can see a client for the vouched services.

2. Click on the **Profile** link in the Action column.

A *Voucher* screen with a "Vouched Services List" will appear.

3. To accept or decline the voucher click on the **Accept** or **Decline** link in the Actions box at the bottom of the page.

Arizona Training

Home Page
Agency ▶
Client List ▼
Client Profile ▼
Alternate Names
Additional Information
Contact Info
Collateral Contacts
Other Numbers
History
Voucher
Activity List ▶

Voucher List

Voucher#	Payor	Available	Last Activity Date	Actions
38	ATR [ATR, State-RSS]	338.0000	3/17/2008	Profile

Voucher for 01, Client

Group Enrollment: ATR Status: Pending
Plan: ATR Agreement: State-RSS - ATR State-RSS
Voucher #: 38 Date Approved: 3/17/2008
Effective Date: 3/17/2008 Updated Date: 3/17/2008 6:09 PM
End Date: 6/17/2008 Updated By: Provider, Agency
ATR Intake: 3/17/2008

Comments

Vouched Services List

Service	Vouched Units	Vouched Amount	Encumbered	Expended	Available
Assessment - Diagnostic Interview	2	\$240.00	0.0000	0.0000	240.0000
Housing Assistance	1	\$98.00	0.0000	0.0000	98.0000

Actions: [Accept](#) [Decline](#)

Total Vouched: 338.0000
Total Encumbered: 0.0000
Total Expended: 0.0000
Total Available: 338.0000

Finish

Please Note: If you **Accept** this voucher you have accepted this client and agree to provide the vouched service. If you **decline**, you are indicating that you will not provide the vouched services.



Section Two:

Client Services

✓ Performing a Client Search

With the exception of accepting referrals, all of the actions in the VMS will be through the system's client record, including: accepting a client voucher, recording services rendered, and submitting records for billing.

The first step opening the system's client record involves performing a client search.

To perform a client search:

1. Move your mouse to the *Left Side Navigation Pane* and click on the **Client List** Link

A blank *Client Search* screen will appear.

- ✓ To search for clients referred to your agency, fill in any of the search fields (First, Last, SSN, DOB).
- ✓ To see a comprehensive list of all clients referred to your agency, leave all of the search fields blank.

2. Click the Go button.

Once the *Client List* is populated, look for the particular client whose referral you would like to review.

3. Click on the **Profile** active link for the appropriate client. This link is located in the row where the client's name is listed.

The screenshot displays the Arizona Training VMS interface. On the left is the 'Left Side Navigation Pane' with a tree structure. The 'Client List' link is highlighted with a red circle and the number 1. The main area shows the 'Client Search' form with various input fields and a 'Go' button. A yellow arrow points from the 'Go' button to the 'Client List' table below. The table has columns for Client ID, Full Name, DOB, SSN, Gender, and Actions. The 'Profile' link in the Actions column of the first row is highlighted with a red circle and the number 3.

Arizona Training

- Home Page
- Agency ▶
- Client List** ▼
- Client Profile ▶
- Activity List ▶
- Episode List
- System Administration ▶
- My Settings ▶
- Reports

Client Search

Agency: [] Facility: []

First Name: [] Last Name: []

SSN: [] DOB: []

Client ID: [] Provider Client ID: []

Treatment Staff: [] Primary Care Staff: []

Case Status: [All Clients] Intake Staff: []

Other Number: [] Number Type: []

[Clear] [Go]

Client List (Export)

Client ID	Full Name	DOB	SSN	Gender	Actions
F11965901685100	1026, Test	1/1/1956	222-56-8569	Female	Profile Activity List
F479935KK858100	Kkk, Tia	4/7/1989	125-56-5385	Female	Profile Activity List
M229542OM184100	Mouse, Mickey	2/2/1945	365-56-8412	Male	Profile Activity List
M449894ER877100	referralAuthTest2, bobby	4/4/1978	564-98-7984	Male	Profile Activity List
M419082ER957100	referralAuthTest3, bobby	4/1/1970	123-46-5892	Male	Profile Activity List
M559954ER617100	referralAuthTest4, bobby	5/5/1979	564-32-1564	Male	Profile Activity List
M449064ER518100	referralAuthTest5, bobby	4/4/1980	465-23-1654	Male	Profile Activity List



Section Two:

Client Services

✓ Reviewing Client Information

By clicking on the **Profile** active link in the client record on the *Client List* screen, you will open the *Client Profile* screen.

- ✓ From this screen you can use the Next navigation button to see additional information including
 - Alternate Name
 - Phone numbers
 - Addresses
 - Collateral Information
 - Additional information including special needs, ethnicity and notes
 - History of the record (who has entered information on the client)
- ✓ At any time, you may click on the Finish button to complete your review.

Client Profile

First Name	Michael	Provider Client ID	
Middle Name		Client ID	M119584MS977100
Last Name	Smith	Record Created By	Sarhy, Marion
Mother's Maiden Name		Last Updated By	Sarhy, Marion
Gender	Male	Created Date	2/28/2008 11:00 PM
DOB	1/1/1975	Last Updated Date	2/28/2008 11:00 PM
SSN	123-78-7894		
Driver's License			
Has paper file	Yes		

Finish Next

Alternate Names

Last Name	First Name	Middle Name	Actions

Addresses

Address Type	Address	Confidential	Created	Updated	Actions



Section Two:

Client Services

✓ Reviewing Client Vouchers

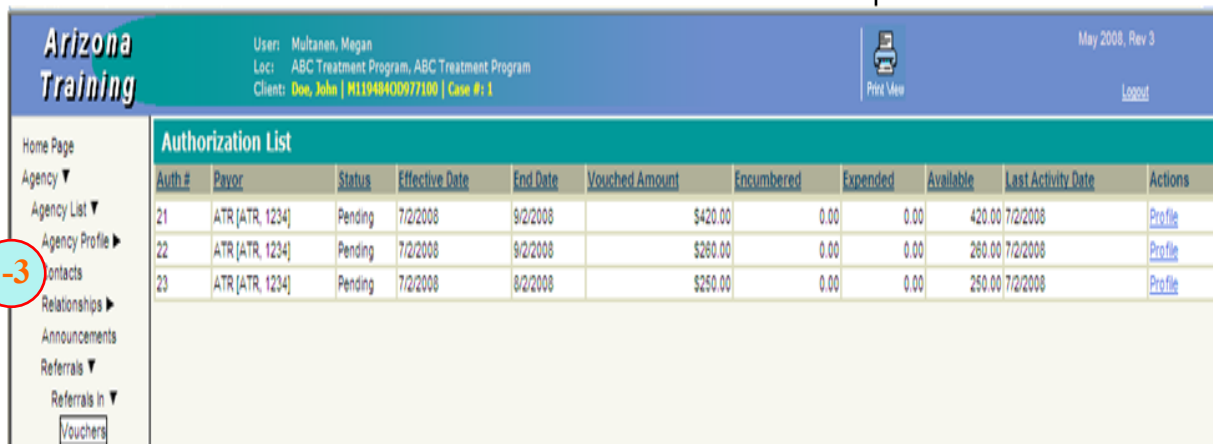
Once you have accepted a referral, you can go in at any time and view a summary, as well as a more detailed description of the voucher. The *Authorization List* gives an overview of the vouchers that are connected to this client's referral.

- ✓ When the Authorization List is opened through the Agency link, you will be able to view all of the information, but you will not be able to take any actions, including accepting the voucher, from this screen.

To review voucher(s) for a client whose referral has been accepted:

1. On the *Left Side Navigation Pane*, under the **Agency** link, click on the **Referrals** link and then on the **Referrals In** link
2. Select the client referral connected to the voucher you want to review. The client name will appear in yellow on the *Top Navigation Bar*
3. Click on the **Vouchers** link.

The Vouchers link will open the *Authorization List* screen, which provides voucher information summary on each of the vouchers issued to your agency for this client.



Arizona Training

User: Multanen, Megan
Loc: ABC Treatment Program, ABC Treatment Program
Client: Doe, John | M11948400977100 | Case #: 1

May 2008, Rev 3

Print View Logout

Home Page
Agency ▼
Agency List ▼
Agency Profile ▶
Contacts
Relationships ▶
Announcements
Referrals ▼
Referrals In ▼
Vouchers

1-3

Auth #	Voucher	Status	Effective Date	End Date	Vouched Amount	Encumbered	Expended	Available	Last Activity Date	Actions
21	ATR [ATR, 1234]	Pending	7/2/2008	9/2/2008	\$420.00	0.00	0.00	420.00	7/2/2008	Profile
22	ATR [ATR, 1234]	Pending	7/2/2008	9/2/2008	\$260.00	0.00	0.00	260.00	7/2/2008	Profile
23	ATR [ATR, 1234]	Pending	7/2/2008	9/2/2008	\$260.00	0.00	0.00	260.00	7/2/2008	Profile

Please Note: viewing a client's voucher for services is not a consent to provide services.



Section Two:

Client Services

✓ Reviewing Referral Vouchers

The *Authorization Service* screen gives you a more detailed view of the client's voucher, including the requested service, the monetary value of the voucher, and the active and expiration dates.

1. From the *Authorization List* screen, click on the **Profile** link in the Actions column.
 - ✓ Each voucher you receive from the Drug Courts will contain only one service.
2. Once you have reviewed the voucher details click the Finish button. This will return you to the *Authorization* screen.

✓ **Remember:** Viewing the voucher does not commit you to providing services. You will be able to accept or reject the voucher in the next step.

Auth #	Pavor	Status	Effective Date	End Date	Actions
21	ATR [ATR, 1234]	Pending	7/2/2008	9/2/2008	Profile 1
22	ATR [ATR, 1234]	Pending	7/2/2008	9/2/2008	Profile
23	ATR [ATR, 1234]	Pending	7/2/2008	8/2/2008	Profile

Service	Authorized Units	Vouched Amt	Encumbered	Expended	Available
Group Standard Outpatient Treatment Services	10	350.0000	0.00	0.00	350.00



Section Two:

Client Services

✓ Creating an Encounter Record

After accepting a client's voucher you can begin providing services that are billable to the Access to Recovery Program.

Services are recorded in the VMS as a Client Encounter. Creating an Encounter record as services are provided is required because this is where the system shows:

- ✓ Proof service was rendered
- ✓ Case notes that may be important to your agency
- ✓ How services are billed and paid

To create an **Encounter** for a client:

1. Using the *Left Side Navigation Pane*, select the client that this Encounter is for. (see p. 11 for detailed instructions on client searches).
2. Once the Client record is active, click on the **Activity List** and then on the **Encounters** link. This opens an Encounter List screen.
3. Click on the Add Encounter Record link to create a new **Encounter**

The screenshot displays the VMS interface. On the left is the 'Left Side Navigation Pane' with links: Home Page, Agency, Client List, Client Profile, Activity List, Intake, and Encounters. A red circle with the number '2' is around the 'Encounters' link. A yellow arrow points from this link to the 'Add Encounter Record' link in the 'Encounter List' table. The 'Encounter List' table has columns: Svc Date, Service, and Actions. A red circle with the number '3' is around the 'Add Encounter Record' link in the Actions column. Below the table is the 'Encounter For Handy, Fred' form. The form includes fields for ENC ID, Created Date, Service, Program Name (ATR: 7/1/2008 -), Service Location, Start Date, End Date, Start Time, End Time, Duration, # of Service Units/Sessions, and Rendering Staff (Calendine, Kay). There is also a Notes section at the bottom.



Section Two:

Client Services

✓ Creating an Encounter Record

In the *Encounter for [Client]* screen, complete the required fields.

1. Service: Only the services issued on the voucher will appear in the Service drop-down box.
2. Program Name: This will always default to ATR
3. Service Location: This is not a required field; however, if your agency has more than one location select appropriate location
4. Start Date: The day the service is rendered.
 - ✓ This refers to the date the service was provided, not the date the voucher was issued. Please be sure each Encounter record that is created *for the same service* has a unique Start Date
5. Service Units/session: This must be fewer than or equal to the number of units indicated on the voucher.
6. Rendering Staff: The system will automatically enter the name of the VMS-trained personnel.
7. Notes: These are clinical notes for your purposes only. They are confidential and cannot be viewed by outside Agencies.

Svc. Date	Service	Actions

Encounter For Handy, Fred

ENC ID: [] Created Date: []

Service: []

Program Name: ATR : 7/1/2008 - []

Service Location: []

Start Date: [] End Date: []

Start Time: [] End Time: []

Duration: [] []

of Service Units/Sessions: []

Rendering Staff: Calendine, Kay []

Notes: []



Section Two:

Client Services

✓ Completing an Encounter Record

1. Once you complete the required fields click on the Finish button. You will be returned to the *Encounter List* screen.

✓ This **Encounter** will now appear in the *Encounter List* with a status of "Not Released".

✓ You may continue to edit and add information to this **Encounter** until you choose to Release the Encounter to billing.

2. To edit an **Encounter**, click on the **Review** link in the Actions column

Arizona Training User: Calendine, Kay Loc: 10 Test Provider, 10 TP Facility Client: Barker, Bob M829000A8877110		August 2008 Logout	
Home Page Agency ▶ Client List ▼ Client Profile ▶ Activity List ▼ Intake Encounters ▼ Profile	Encounter List (Export)	Add Encounter Record	
Svc Date	Service	Status	Actions
10/1/2008	Group Intensive Outpatient Treatment Services	Not Released	Review 2



Section Two:

Client Services

✓ Releasing the Encounter

It is recommended that **Encounters** be released to billing as soon as possible, preferably on a weekly basis or as soon as services are provided.

To see the details of a completed **Encounter** and release it to billing:

1. Return to the **Encounter List** screen following the steps outlined for “Completing an Encounter Record”
2. Choose the appropriate Encounter record from the list and click on the **Review** link located in the **Actions** column.

✓ Note that now the “Administrative Actions” box, two active links appear: **Release to Billing** and **Delete**.

3. Click on the **Release to Billing** Actions link if the Encounter is ready for billing.
 - ✓ When an **Encounter** is released to billing, it becomes ‘read-only’ and cannot be edited.
If you release an Encounter before it was ready for billing, contact your Drug Court Case Managers.
 - ✓ You will see that the **Encounter** Status has changed in the **Encounter List** screen and now reads “Released.”

Arizona Training

User: Calendine, K
Loc: 10 Test Prov
Client: Barker, Bob J

August 2008
Logout

Home Page
Agency ▶
Client List ▼
Client Profile ▶
Activity List ▼
Intake
Encounters ▼

Encounter List (Export)

Svc Date	Service	Status	Actions
10/1/2008	Group Intensive Outpatient	Not Released	Review 2

[Add Encounter Record](#)

Encounter For 02, Client

ENC ID 62 Created Date 4/14/2008 8:56 PM

Service Detoxification

Program Name ATR : 1/1/2008 -

Service Location

Start Date 4/14/2008 End Date

Start Time End Time

Duration # of Service Units/Sessions 1

Rendering Staff Najera, Ludwing

Notes
Client notes can be entered into this text input box...

3 Administrative Actions
[Release to Billing](#) [Delete](#)

August 2008
Logout

[Add Encounter Record](#)

Status	Actions
Released ✓	Review

Cancel Save Finish



Section Three:

Billing and Payment

✓ Claim Batch Processing

After you release an **Encounter** to billing, the encounter becomes a **Claim** for Payment.

Once a week, the VMS puts all of the claims your agency has submitted into a Claim Batch.

These Claim Batches are reviewed for accuracy and then forwarded for payment. The system will generate an automatic email to let you know the claim has been accepted.

Occasionally, a discrepancy may be found in one of the Claims. When this occurs, the entire claim batch will be returned to you for correction. (See pages 21-25 for instructions on correcting a Claim.)

Although this process takes place entirely within the VMS, you will also receive an email explaining why the Claim Batch was returned and what corrections are needed.

Provider Claim Submission Acceptance Confirmation

The following e-mail will be send upon acceptance

To:

CC:

Subject: Claim Submission - Accepted

Message: This email is to acknowledge receipt and acceptance of your claim submission received on 7/28/2008 with claims totaling \$200.00.

Cancel

Accept

Provider Claim Submission Rejection Confirmation

The following e-mail will be send upon acceptance

To:

CC:

Subject: Claim Submission - Rejected

Message: This email is to acknowledge receipt and rejection of your claim submission received on 7/28/2008 with claims totaling \$200.00. Your submission has been rejected for the following reason(s):

The reviewer will provide an explanation for the claim rejection

Cancel

Reject



Section Three:

Billing and Payment ✓ Reviewing Claims

The VMS allows you to track your claims as they advance through the system.

To view the status of a claim:

1. Using the Left Side Navigation Pane, click on the Agency and Billing links.
2. The first item under Billing is Claim Item List. Click on this to open the Claim Item Search page.

✓ You can search Claim Items by entering the criteria into the search fields or leave all fields blank to generate a list of all Claim Items.

✓ By default, the *Claim Item List* will display all **Claims** with the “Awaiting Review” status.

Item Status Definitions:

- Awaiting Review: These claims have not completed the system-automated review process.
- Hold: The Hold status indicates that the review process has been temporarily suspended for this claim.
- Released: This claim has completed the system review and is ready to be batched.
- Batched: Claims with a Batched status have been processed through VMS and are ready to be submitted for payment.
- Rejected-Awaiting Review: This status indicates the system-automated review detected a claim error, and the claim was manually reviewed and returned to the Agency for correction.

Arizona Training

User: Calendine, Kay
Loc: 10 Test Provider, 10 T
Client:

Home Page
Agency ▾
Agency List ▶
GPRA Discharge Due
GPRA Followup Due
Facility List ▶
Staff List ▶
Staff Usage
Billing ▾
Claim Item List
Claim Batch List
Encounter List
EOB Transaction List
Payment List ▶
Billing Transaction List
Client Balance
Payor Plan List ▶

Claim Item Search

Plan
Client First Name
Subscriber/Resp Party First Name
Subscriber/Resp Party Account #
Voucher #
Item Status

Claim Item List

Item #



Section Three:

Billing and Payments

✓ Reviewing Claims

The Claim Item List displays the results of your Claim Item search.

1. Click on the Profile link in the Actions column to see more detailed information on the Claim Item.
 - ✓ The detailed profile includes information on the type of service provided, the service dates, billing units and payment amounts.

Claim Item Search

Plan Group Enrollment ENC ID
Client First Name Client Last Name Charge
Subscriber/Resp Party First Name S/R Party Last Name Service
Subscriber/Resp Party Account # Rendering Staff Service Date
Voucher #
Item Status Facility

Claim Item List (Export)

Item #	Client Name	Service Date	Service	Duration	Status	Release Date	Charge	Actions
33	04, Client	3/6/2008	2110		Awaiting Review-Insufficient Funds	3/6/2008	\$900.00	Profile
34	04, Client	3/6/2008	2110		Awaiting Review-Insufficient Funds	3/6/2008	\$600.00	Profile
37	04, Client	3/6/2008	2020/IN		Awaiting Review-Insufficient Funds	3/6/2008	\$165.00	Profile
42	04, Client	3/7/2008	2110		Awaiting Review-Insufficient Funds	3/7/2008	\$500.00	Profile

Profile for Claim Item # 108 for Barker, Bob

ENC ID: 96 Delivered Service: 2080/IO
Service Start: 10/1/2008 12:00 AM
Service End: 10/1/2008 12:00 AM
Duration:
Sessions/Units: 5
Rendering Staff: Calendine, Kay

Program: ATR
Diagnoses: / /
Pregnant:
Status: Released

Service Fee
Billing Units X Rate / Unit =
Cost Center
Billing Note
Post Date

Group Enrollment
Plan
Payor Billing Service

Service Location
Unit Desc
Authorization Available
Available to pay this claim item:



For help with the VMS system, email azatrhelp@thepartnership.us

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Section Three:

Billing and Payments

✓ Resolving a Rejected Claim Batch

A Claim Batch may be rejected for several reasons, including for example, if units were inadvertently double billed, or an encounter was released prematurely.

VMS will generate an email notifying you that the claim batch was rejected, and you will need to go into VMS to resolve the rejected claim batch.

Resolving the Claim Item error requires 4 steps:

1. Remove the claim item needing fixing;
2. Resubmit the claim batch minus the claim item;
3. Correct the claim item;
4. Resubmit the corrected claim item;

A minority of claims will have slightly different procedures for resolving a claim. Page 25 reviews the exceptions and details the additional steps needed to resolve the claim.



Section Three:

Billing and Payments

✓ Resolving a Rejected Claim Batch

Removing a Claim Item:

1. Starting at the Left Navigation Menu, first click on agency, then billing, then claim batch list.
2. On the Provider Claim Batch List page, search for batches with a "Rejected-Awaiting Review" status. This status indicates the Claim Batch in question.
3. In the Actions column for that batch, click on [Claim Items](#)

The Claim Items for that batch will appear in the Claim Items table

4. Click in the check box on the far left side of the Claim Item List table to select the claim item needing to be modified or deleted from the batch
5. Then click on [Remove from Claim Batch](#) in the upper right hand corner of the Claim Item list table.

This action will remove the specified claim item.



Section Three:

Billing and Payments ✓ Resolving a Rejected Claim Batch

Reprocessing the Original Claim Batch:

Once the claim item that needs correcting is removed from the claim batch, the original batch will need to be resubmitted.

To Resubmit a Claim:

1. Return to the Provider Claim Batch List screen
2. Click on the Profile link associated with the claim to be reprocessed. It will still show a “Rejected-Awaiting Review” status.
3. Click on the [Reprocess Batch](#) link in the Administrative Actions box.

This will change the status to Released, and the options available in the Administrative Actions box will change to Awaiting Review, Hold, Void, and Bill It

4. Click on the [Bill It](#) link to send the batch to the payer for approval. The status of the batch should be “Billed” in order to be processed for payment.

Provider Claim Batch List

Plan Name: [Dropdown] Created Date: [Text]
 Billing Form: [Dropdown] Transmit Date: [Text]
 Batch #: [Text] Status: [Dropdown]
 [Clear] [Go]

Claim Batch List (Export)

Batch #	Status	Batch For	Billing Form	Order	Charges	Service Mo/Yr	Created	Transmit	Actions
20	Billed	TP9 Contract	WITS Batch	P	\$250.00		7/10/2008	7/10/2008	Claim Items Profile
29	Rejected-Awaiting Review	TP9 Contract	WITS Batch	P	\$250.00		7/10/2008	7/10/2008	Claim Items Profile
37	Accepted	TP9 Contract	WITS Batch	P	\$600.00		7/28/2008	7/28/2008	Claim Items Profile

Provider Claim Batch Profile

Batch # 26 Charge Amount \$70.00
 Batch For TP6 Contract Status Rejected-Awaiting Review
 Created By Process, Claim Batch Created Date 7/10/2008 6:20 PM
 Updated By Process, Claim Batch Updated Date 7/10/2008 6:20 PM
 Billing Form WITS Batch Transmit Date 7/10/2008 12:00 AM
 Order Primary Ignore Warnings No
 Service Month/Year

Errors List (Export)

Batch #	Level	Message	Created	Claim #	Item #

Administrative Actions: [Release](#) [Hold](#) [Void](#) [Reprocess Batch](#) [Cancel] [Save] [Finish]

Provider Claim Batch Profile

Batch # 20 Charge Amount \$250.00
 Batch For TP9 Contract Status Released
 Created By Process, Claim Batch Created Date 7/10/2008 2:50 PM
 Updated By Process, Claim Batch Updated Date 7/10/2008 2:50 PM
 Billing Form WITS Batch Transmit Date 7/10/2008 12:00 AM
 Order Primary Ignore Warnings No
 Service Month/Year

Errors List (Export)

Batch #	Level	Message	Created	Claim #	Item #

Administrative Actions: [Awaiting Review](#) [Hold](#) [Void](#) [Bill It](#) [Cancel] [Save] [Finish]



Section Three:

Billing and Payments

✓ Resolving a Rejected Claim Batch

Correcting a Claim Item:

With the Claim Item removed and the original Claim Batch resubmitted, you are now ready to correct the Claim Item and resubmit it to billing.

To correct a claim item:

1. Click on the Claim Item List link in the Left Navigation Menu.
2. Select the appropriate Claim Item to review, and click on the Profile link in the Actions column.
- ✓ The Administrative Actions box shows three options:
 - 3a. You may modify the units and then save and click [Release](#) to re-release the claim for billing;
 - 3b. [Hold](#) the claim, which will allow you to hold off on making any changes, although some action will be required at some point for payment; or,
 - 3c. [Reject \(Back out\)](#) of the claim. If you choose to reject or back out of the claim, it is removed from the system, and a new encounter will need to be created.
4. Once you re-release the claim for billing, it will be included in the next batching of claims.

The screenshot displays the VMS system interface. On the left is a navigation menu with a red circle '1' next to the 'Claim Item List' link. The main area shows the 'Claim Item Search' form and a 'Claim Item List (Export)' table. The table has columns for Item #, Client Name, Charge, and Actions. A yellow arrow points from the 'Profile' link in the Actions column of the first row to the 'Administrative Actions' box in the Claim Item Detail screen. The 'Administrative Actions' box contains three options: 'Hold', 'Release', and 'Reject (Back Out)'. A red circle '3' is next to the 'Administrative Actions' box. The bottom of the screen shows 'Cancel', 'Save', and 'Finish' buttons.

- ✓ Note: Encounters corresponding to claims that have been backed-out will appear in red in the encounter list. The encounter can then be either modified as needed and released to billing or deleted from the encounter profile screen.



Section Three:

Billing and Payments

✓ Resolving a Rejected Claim Batch

Situational Variations for Claim Batch Resolutions:

Under certain circumstances, you will have a claim batch that requires additional steps to resolve it.

The two circumstances you are most likely to encounter are described below, along with the additional steps you will need to take to reconcile the Claim Batch.

If a Claim Batch is resubmitted prior to making modifications:

- ✓ If a rejected claim batch is reprocessed before modifications were made, you will need change the claim's status in the system before you will be able to modify the claim.

To change the status:

1. Click on the Claim Batch list on the left hand side Navigation Pane
2. Search for the appropriate claim batch
3. Click on the [Profile](#) link for that claim batch
4. Click on "[Awaiting Review](#)" in the Administrative Action box on the lower left side of the screen.

Once the status has been changed, continue with step 2 on page 22.

The screenshot shows the VMS system interface. On the left is a navigation pane with a tree structure. The 'Claim Batch List' is highlighted in the 'Billing' section. The main area displays the 'Provider Claim Batch List' with search filters (Plan Name, Billing Form, Batch #) and a 'Clear' button. Below this is a table of claim batches. The 'Provider Claim Batch Profile' for Batch # 20 is shown, including details like 'Batch For TP9 Contract', 'Created By Process, Claim Batch', 'Updated By Process, Claim Batch', 'Billing Form WITS Batch', 'Order Primary', and 'Service Month/Year'. Below the profile is an 'Errors List (Export)' table. At the bottom, the 'Administrative Action' box contains links: 'Awaiting Review', 'Hold', 'Void', and 'Bill'. A yellow arrow points from the 'Awaiting Review' link in the Administrative Action box to the 'Awaiting Review' link in the Errors List.

Batch #	Status	Batch For	Billing Form	Order	Charges	Actions
27	Billed	TP7 Contract	WITS Batch	P	\$200.00	Claim Items Profile
35	Accepted	TP7 Contract	WITS Batch	P	\$300.00	Claim Items Profile

Batch # 20	Charge Amount \$250.00
Batch For TP9 Contract	Status Released
Created By Process, Claim Batch	Created Date 7/10/2008 2:50 PM
Updated By Process, Claim Batch	Updated Date 7/10/2008 2:50 PM
Billing Form WITS Batch	Transmit Date 7/10/2008 12:00 AM
Order Primary	Ignore Warnings No
Service Month/Year	

Batch #	Level	Message	Created	Claim #	Item #

Administrative Action: [Awaiting Review](#) | [Hold](#) | [Void](#) | [Bill](#)

If a rejected Claim Item is associated with a closed voucher:

Claim Items associated with a closed voucher cannot be manipulated.

- ✓ Contact your Drug Court Case Manager to have the voucher temporarily re-opened to allow modifications to a claim item.



Section Three:

Billing and Payment ✓ Reviewing Payments

As with the Claim Batches, you are able to view your claim payment status once they have been submitted for payment.

To review Payment Status:

1. Using the Left Side Navigation Pane, click on the Agency and Billing links.
2. Click on the Payment List link to open the Payment Search screen.
3. Enter any search criteria you want to include and click the Go button to run the search.
 - ✓ The search will generate a payment list showing all payment submissions.
4. Click on the Profile link in the Actions column to view more details.

The screenshot shows the VMS system interface. On the left is a navigation pane with links like Home Page, Agency, Billing, and Payment List. The main area shows the 'Payment Search' form with fields for Payor Plan, Posted Date, Payment Amount, and Contractor. Below this is the 'Payment List (Export)' table. A yellow arrow points from the 'Payment Search' screen to the 'Payment List' screen.

Payment Search

Payor Plan:
 Posted Date:
 Payment Amount:
 Contractor:
 Clear Go

Payment List (Export)

Pmt #	Payor Name	Posted	Payment Amount	Unapplied Amount	Intended For	Created By	Actions
8	AOC Agency - State-CM	2/29/2008	\$0.00	\$0.00			Profile
7	AOC Agency - State-CM	2/29/2008	\$410.00	\$0.00			Profile
6	AOC Agency - State-CM	2/29/2008	\$0.00	\$0.00			Profile
5	AOC Agency - State-CM	2/29/2008	\$165.00	\$0.00			Profile
4	AOC Agency - State-CM	2/28/2008	\$110.00	\$0.00			Profile
3	AOC Agency - State-CM	2/28/2008	\$300.00	\$0.00			Profile
2	AOC Agency - State-CM	2/28/2008	\$700.00	\$0.00			Profile



Section Three:

Billing and Payment

✓ Reviewing Payments – Definitions

The *Payment List* screen shows the status of a specific Claim for Payment. Here you can see all **Claims** released to billing and that are ready for payment.

Payment List Definitions

- Payment #: The payment ID assigned by the paying agency.
- Payer Name: The name of the agency making payment.
- Posted: The day the claim item was submitted for payment
- Payment Amount: The dollar amount that is being billed and requires payment
- Unapplied Amount: The amount remaining that has not been paid.

Payment List (Export)		Add Contract Payment Add Client Payment Add Plan Payment					
Pmt #	Payor Name	Posted	Payment Amount	Unapplied Amount	Intended For	Created By	Actions
8	AOC Agency - State-CM	2/29/2008	\$0.00	\$0.00			Profile
7	AOC Agency - State-CM	2/29/2008	\$410.00	\$0.00			Profile
6	AOC Agency - State-CM	2/29/2008	\$0.00	\$0.00			Profile
5	AOC Agency - State-CM	2/29/2008	\$165.00	\$0.00			Profile
4	AOC Agency - State-CM	2/28/2008	\$110.00	\$0.00			Profile
3	AOC Agency - State-CM	2/28/2008	\$300.00	\$0.00			Profile
2	AOC Agency - State-CM	2/28/2008	\$700.00	\$0.00			Profile
1	AOC Agency - State-CM	2/11/2008	\$100.00	\$0.00			Profile
Total Payment:							\$1,785.00



Section Three:

Billing and Payment ✓ Reviewing Payments

Once you have clicked on the **Profile** active link, the *Payment Profile* screen appears. Here you can enter any necessary information including:

- **Comment**– Enter any comments you have that are not directly related to accounting or billing of this claim. accounting or billing regarding the claim.
 - **Receipt date**– By default this will be the day the payment is to be posted; however, this is an editable field
 - **Intend for**– This drop down menu has the options of On Account or Existing Contract.
- ✓ Click on the Finish button to save any changes and complete review of the payment profile.

You will be taken back to the *Payment List* screen.

The screenshot shows the 'Payment Profile' screen. It contains a form with the following fields and values:

Payment Profile	
Payment #	7
Contract Name	ATR State-CM
Client Name	
Transaction Type	Payment
Reference	7
Comment	
Intended For	On Account
Posted Date	2/29/2008
Receipt Date	2/29/2008
Created Date	2/29/2008 11:38 AM
Created By	
Payment Amount	\$410.00
Unapplied Amount	\$0.00

Below the form is an 'Administrative Actions' section with two links: [Show Payment Application](#) and [Apply Payment](#). At the bottom right, there are three buttons: 'Cancel' (yellow), 'Save' (blue), and 'Finish' (blue). A red circle with a checkmark is drawn over the 'Finish' button.



Section Four:

End of Services ✓ Closing a Client Intake

Once the client's vouchers have been expended, if you do not anticipate providing any additional services to this client, you will need to "Close the Case" for that client. Once a client is closed, you no longer have the ability to see information related to that client.

To close a client case:

1. Make sure the record for the client whose case you are closing is active.
 - ✓ You can verify you are in the right client record by looking to see whether the client's name appears in the *Top Navigation Bar*.
2. From the *Left Side Navigation Pane*, click on the **Activity List** link and then on the **Intake** link.

Intake Case Information

Intake Facility: CM
Intake Staff: Nejara, Ludwig
Initial Contact: Other
Residence: Boone

Case # 2
Case Status: Open Active
Initial Contact Date:
Intake Date: 4/10/2008
Pregnant: No Due Date:
Referral Contact:
Prenatal Treatment:
HIV Positive: No
Problem Area:
ATR Intake? Yes

Inter-Agency Service: Child Protective Services (OCS), Court/Legal Interface, DCSF, Developmental Disabilities
Inter-Agency Service Selected: Social/Community Services

Date Closed:
Save & Close the Case
Cancel Save Finish

This will open the *Intake Case Information* screen.

3. Enter the desired date in the "Date Closed" field located in the lower left-hand corner of the page and click on the **Save & Close the Case** link
4. Click on the Save and Finish button to complete this step.

